User Manual

Project: Paragon

Paragon–004–User Manual–EN02.doc
T– WDT (Word Document Template)–EN02.doc

11/06/2013
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Information

General

Project Name:	Paragon
Document title:	User Manual
Reference:	

Distribution list

Name	Function	Copy	Information
Maria Penedos	Project Director Altran	X	
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Table 1 – Distribution list

Change History

Date	Revision #	Author	Revision Description	Approved
06–06–2013	1	Patrícia Alves	Initial document	Yes
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11–06–2013	3	Patrícia Alves	All images changed to meet the new interface alterations. Content revision.	Yes

Table 2 – Change history

Reference Documents

Document	Description	Author

Table 3 – Reference documents

Paragon–004–User Manual–EN02.doc

T– WDT (Word Document Template)–EN02.doc

11/06/2013

01/06/2012

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

1 Introduction

1.1 ABOUT THIS DOCUMENT

This document contains detailed instructions on how to use the Paragon Application, constituting the user manual.

1.2 SCOPE

This document does not cover the installation procedures, and assumes that the user has already installed the necessary software to run the application. To read the installation instructions, please see the Installation Manual provided.

1.3 INTENDED AUDIENCE

This document is written specifically for the end user.

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

2 Authentication and Permissions

2.1 AUTHENTICATION

In order to use the application, the user needs to login using his credentials on the application welcome screen (Figure 1).
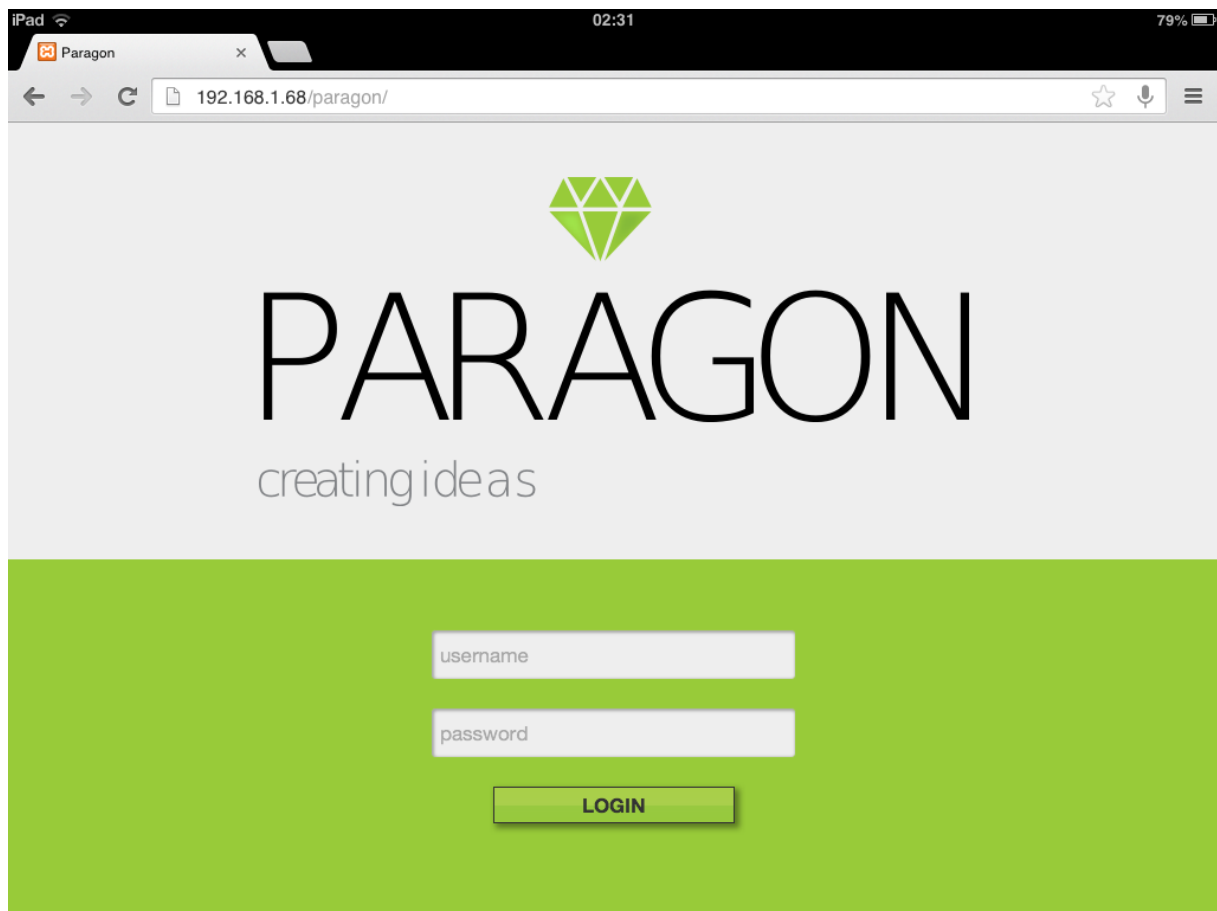

Figure 1. Welcome screen.

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

2.2 PERMISSIONS

The user permissions vary according to the user's profile.

User Profile	Permissions
Regular Users	Any user with access to the system. This user can search, view and contribute with ideas. Anyone with any user profile can submit ideas. Regular users that create items (Ideas), become Owners of those items they create.
Innovation Manager	Innovation manager can approve campaigns. Can select ideas in L5 state to compare.
Executive	Has the rights to perform strategic selection to approve an idea in order for it to become a project. Can select ideas in L5 state to compare.

Table 4 – Permissions table according to the user profile

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Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

Page 7 of 18
11/06/2013
01/06/2012

3 Using the Application

3.1 NAVIGATION BAR

The application has a navigation menu bar (navbar) located at the top of every screen. This navbar has buttons linking to all the functionalities on the application:

- Return to homepage (Figure 2a);
- Create an idea (Figure 2b);
- Consult application KPIs (Figure 2c);
- View own ideas (Figure 2d);
- View favorite ideas (Figure 2e);
- Compare ideas (Figure 2f);
- Search for an idea (Figure 2g);
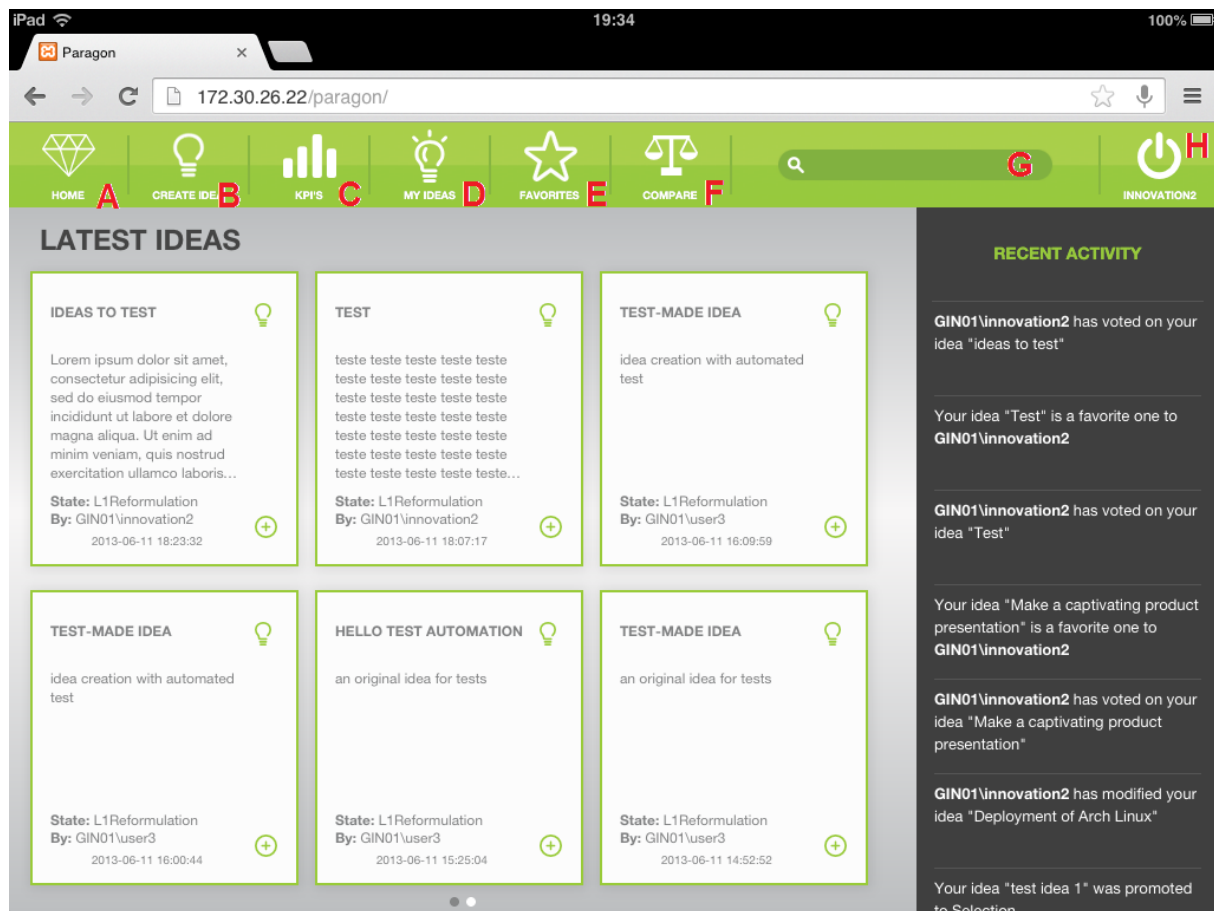- Logout from the application (Figure 2h).

Figure 2. Application main screen and navigation bar.

Paragon–004–User Manual–EN02.doc

T– WDT (Word Document Template)–EN02.doc

11/06/2013

01/06/2012

3.2 HOMEPAGE

The application Homepage is composed by a carousel that shows the "Latest Ideas" (see Figure 3) in the first pane. By swiping the carousel to the left, a second pane with the "Popular Ideas" is shown (see Figure 4). The user can see the most recent ideas in this last view, and the most voted ideas in the other. Each thumbnail corresponds to an idea and shows its title, summary, state, creation date and owner. Only the 6 most recent ideas are shown on each pane.
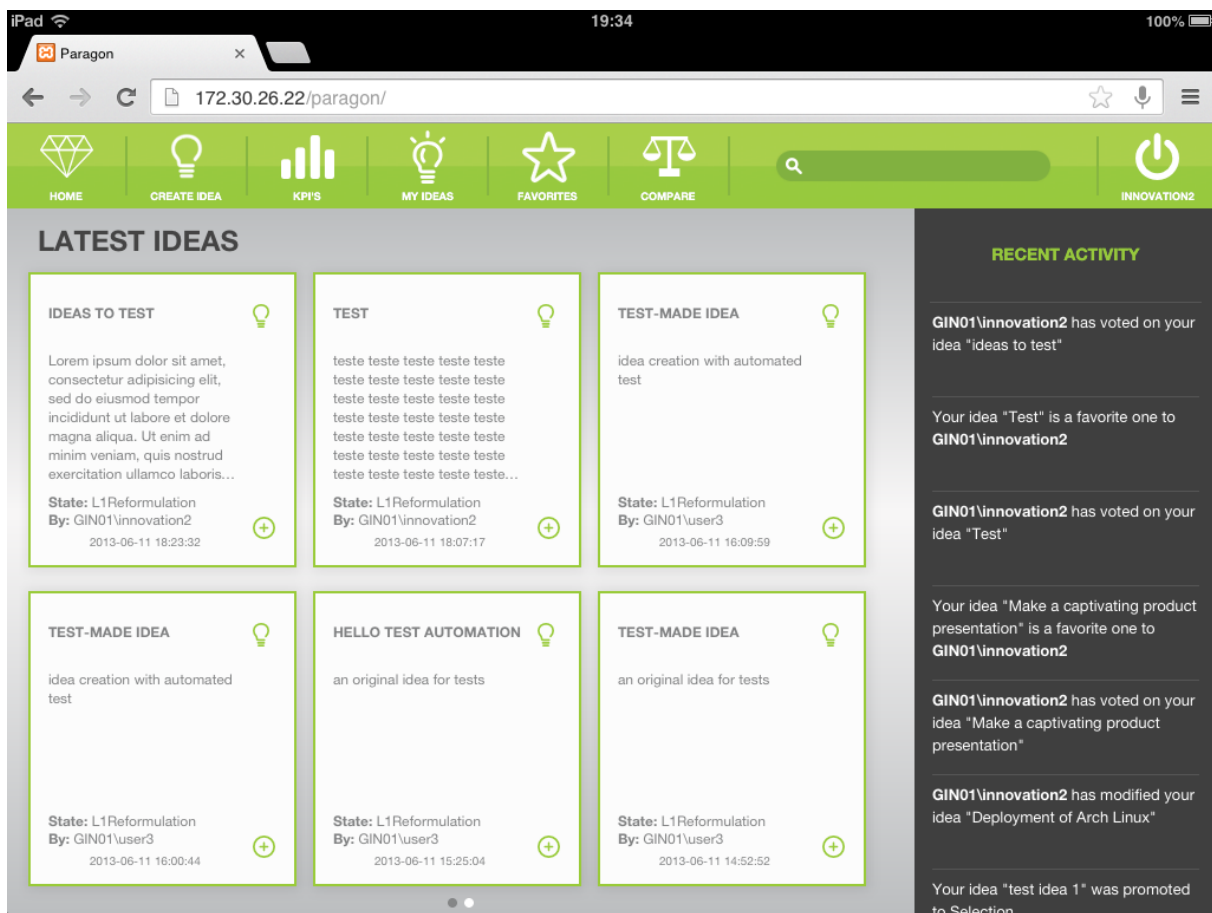

Figure 3. Homepage showing the latest 6 ideas.

3.3 RECENT ACTIVITY

On the panel to the right side of the application screen (see, for example, Figure 3), it is possible to see the latest activities related to the current user ideas, regarding their maturation process (for example, if an idea was promoted to another stage). To see the activity details, just tap the desired activity. A message with the details appears. Tap "OK" to dismiss.
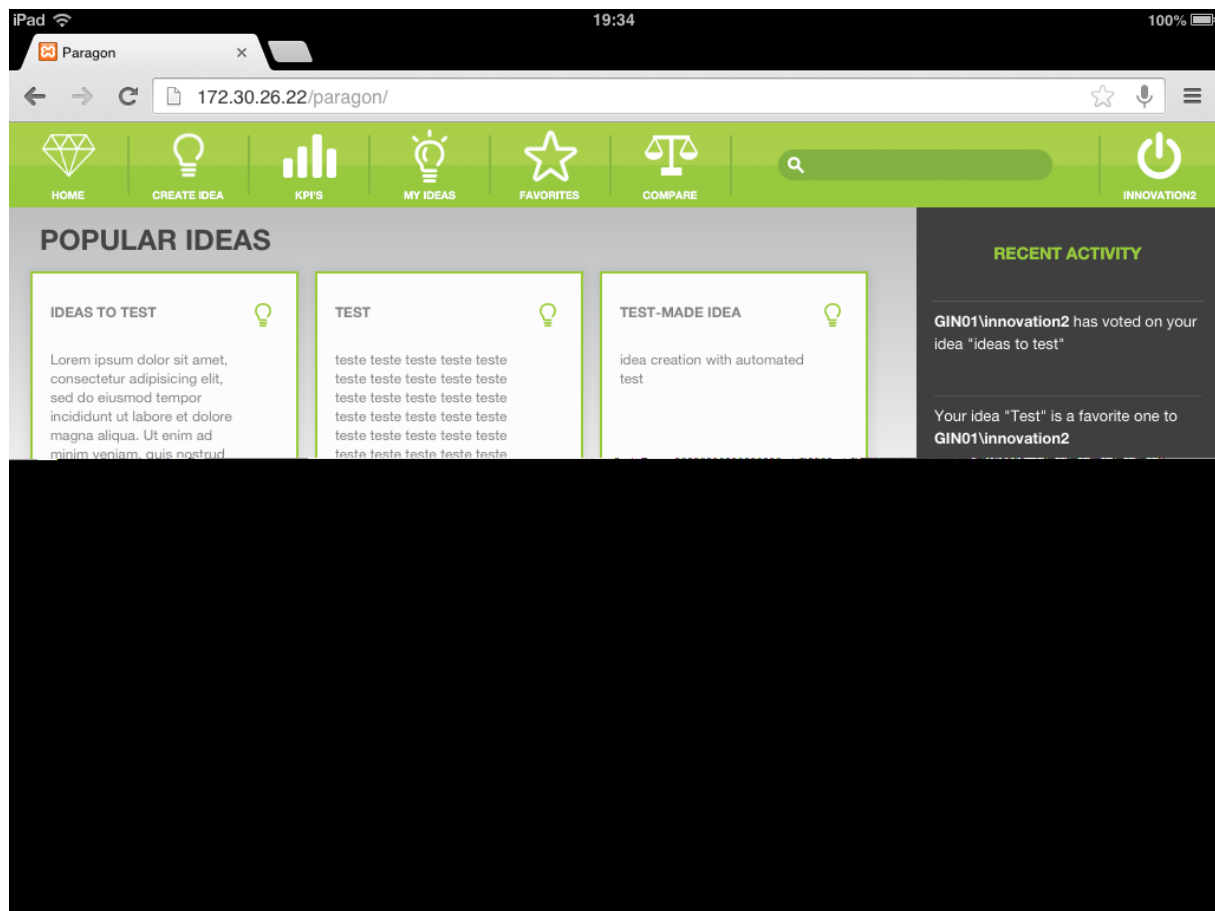
Paragon-004-User Manual-EN02.doc

11/06/2013

T- WDT (Word Document Template)-EN02.doc

01/06/2012

Figure 4. Homepage showing the 6 most popular ideas.

3.4 CREATE AN IDEA

To create and submit an idea tap the "CREATE IDEA" button in the navbar. A form appears where the user needs to fill the necessary fields to submit his idea (Figure 5).

After filling all the fields, select the idea categories by tapping the "categories" button at the end of the form (Figure 6a). A modal with a list of categories appears (Figure 6b). Tap an item to select the desired category. Immediately after, the respective subcategories list is shown. Tap the desired one. The selected subcategory and respective category names appear in a dark green color. If for any reason you chose the wrong subcategory, just tap again the subcategory (the subcategory name turns black again) and choose the correct one. You can select more subcategories by just tapping its name. To select a subcategory from a different category, tap the categories button on the top left of the subcategories modal.

To leave the modal, just tap outside it.

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

To select the idea class, tap the "class" button (Figure 6c) and then the wanted class in the modal that appears (the class name gets dark green). To leave the modal, just tap outside it. To submit the idea tap the "CREATE" button. A success message should appear.
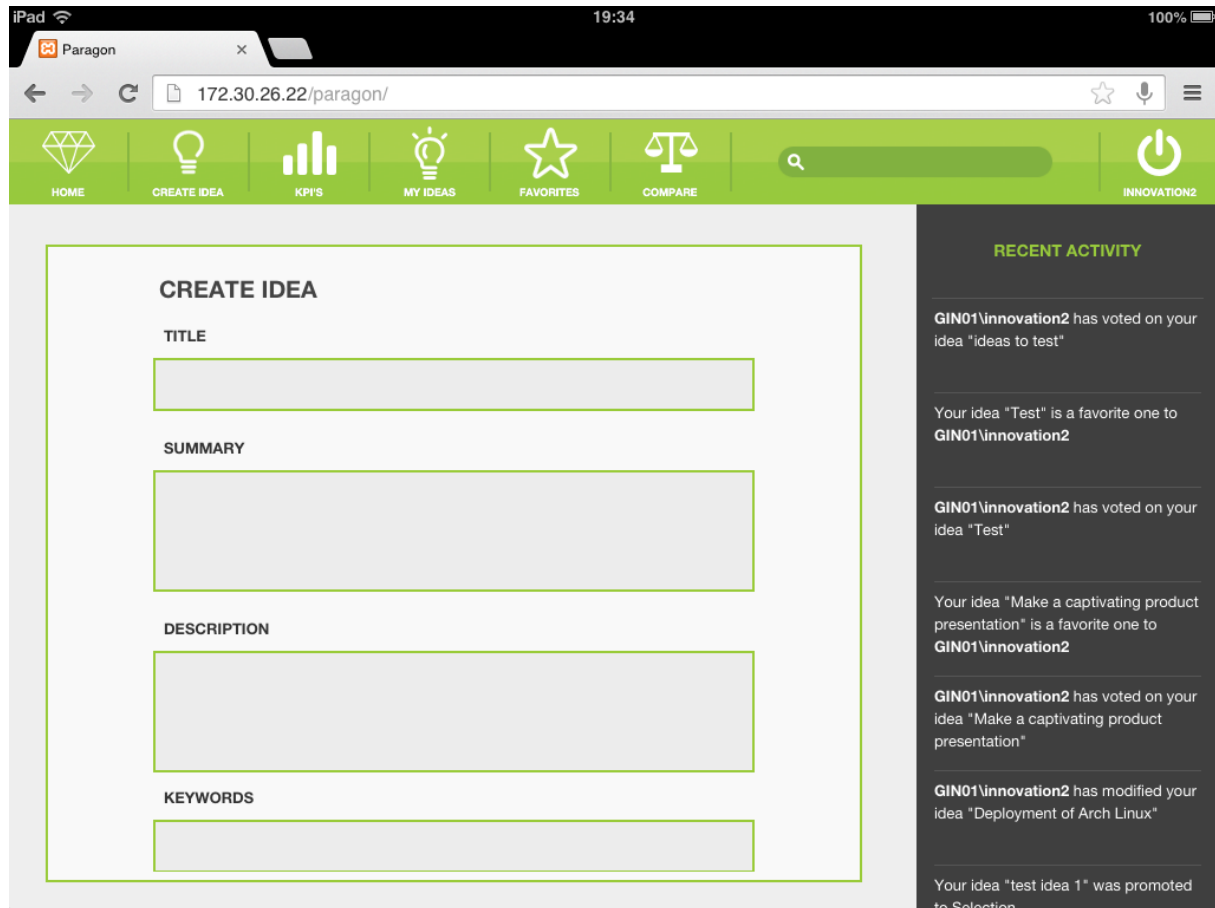

Figure 5. Create idea screen (top view).

3.5   VIEW IDEA DETAILS

To view the details of an idea, tap the respective thumbnail and a new view appears with all the information available for the selected idea (Figure 7). The user can do this in the Homepage or by searching the idea, for example.

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

3.6 VIEW OWN IDEAS

To view your own ideas, tap the "MY IDEAS" button in the navbar. A new screen appears that lists all the user's ideas in thumbnails (Figure 8). To see more ideas just scroll down.
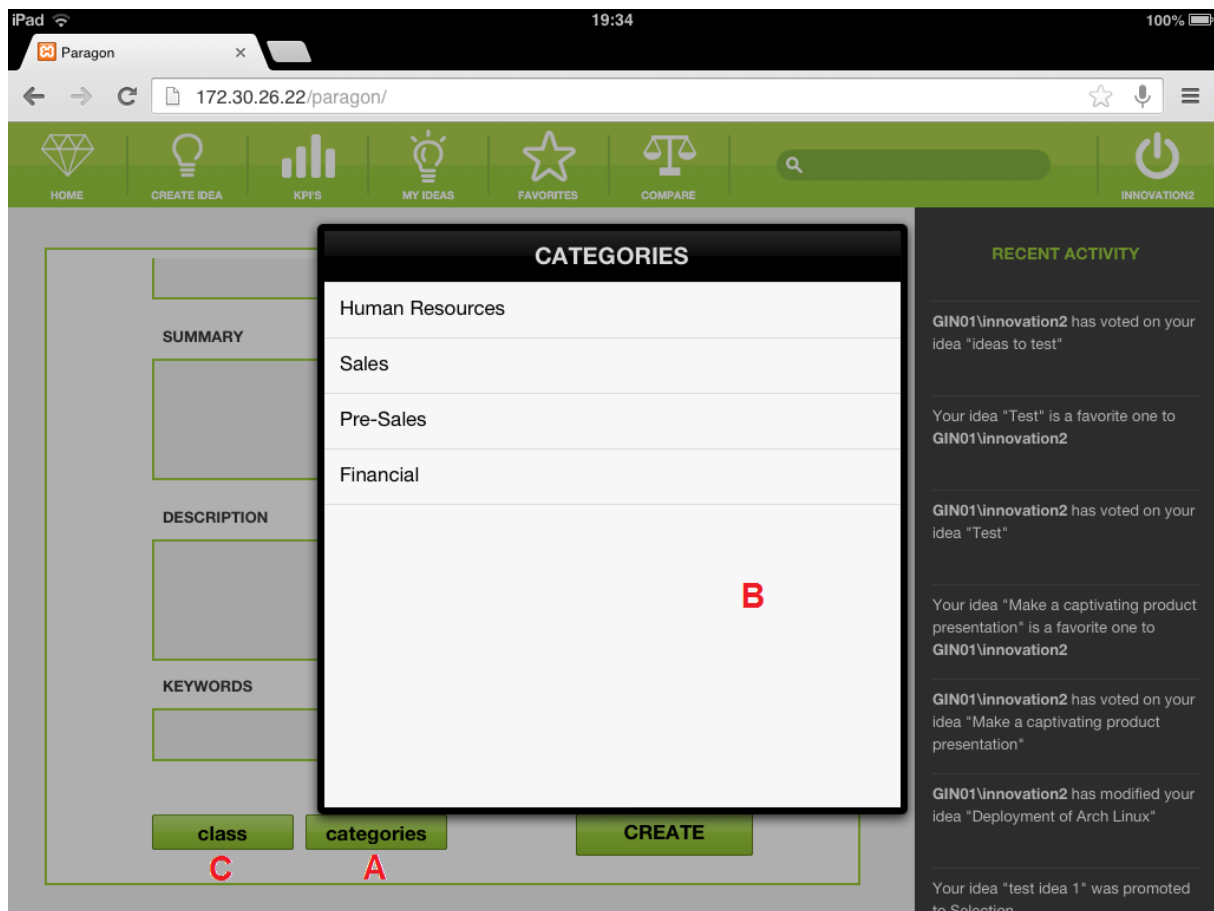To view the details of an idea, tap the respective thumbnail (see 3.5).

Figure 6. Create idea screen (bottom view) showing the categories modal.

3.7 VIEW FAVORITE IDEAS

To view your favorite ideas, tap the "FAVORITES" button in the navbar. A new screen appears that lists all the user's favorite ideas in thumbnails. To see more ideas just scroll down.
To view the details of an idea, tap the respective thumbnail (see 3.5).

3.8   SEARCH FOR AN IDEIA

It is possible to search for a specific idea by its title. Just tap the search field and enter the words to search for (see Figure 2g). Tap enter to submit the search.

All the ideas that match the search criteria are shown in thumbnails in a modal. To view the details of an idea, tap the respective thumbnail (see 3.5).
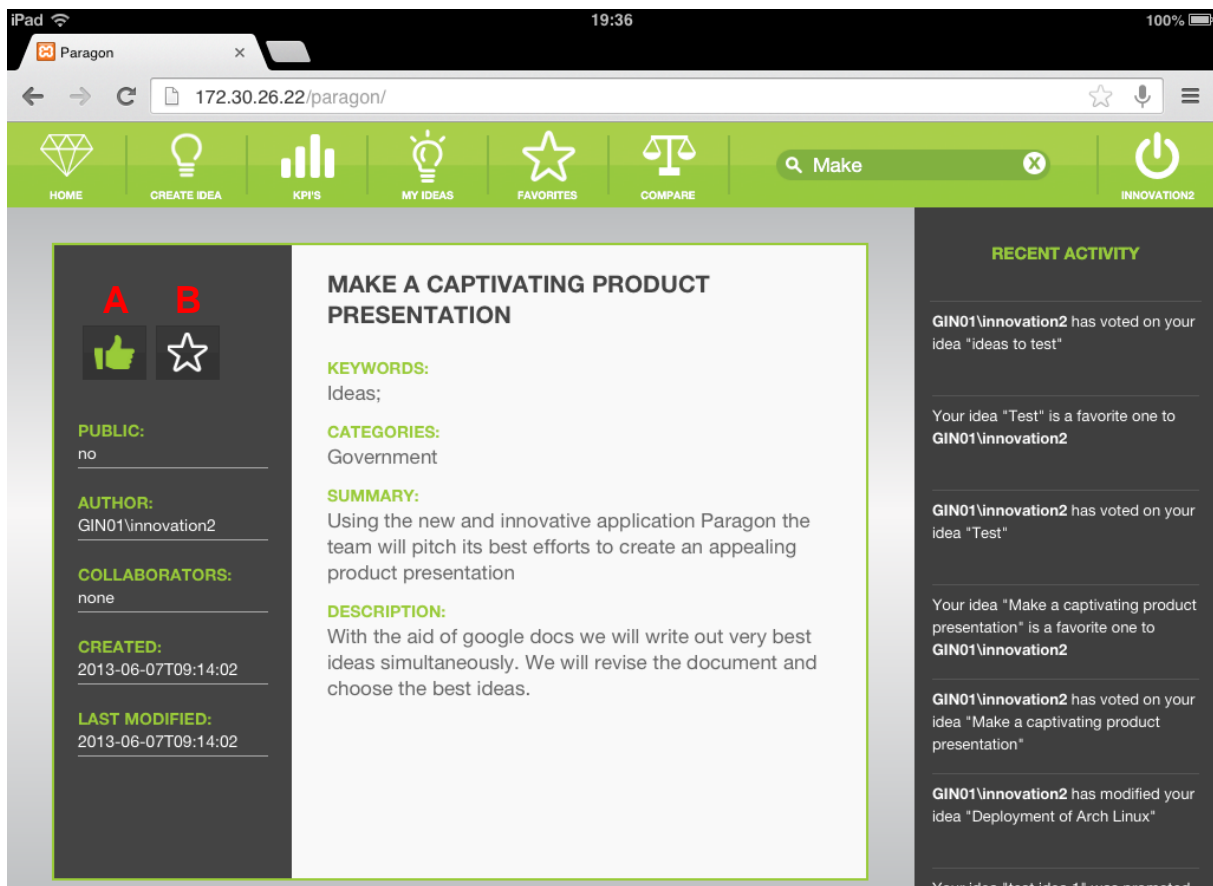
To exit the modal just tap outside the modal.

Figure 7. Details of an idea.

3.9   LIKE AN IDEA

It is possible to like an idea in the detailed view of an idea (see 3.5) by just tapping the button (Figure 7a).

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

3.10 ADD AN IDEA TO FAVORITES

It is possible to add an idea to your favorite ideas (see 3.7) by just tapping the ⭐ button in the idea detailed view (Figure 7b).

3.11 CONSULT THE KPIS

To consult the KPIs (Key Performance Indicators) dashboard tap the "KPIs" button in the navbar (see 3.1).

A carousel with 3 charts appears (Figure 8). The first one, "Total ideas by state", shows the number of ideas on each maturation state, from L1 to L5, as well the total number of ideas in the database. By swiping to the left on the chart area it is possible to consult the other performance indicators: "User Base KPIs and Statistics" (Figure 9), that shows the total number of users, number of active idea owners, number of active idea contributors, and the average ideas per idea owner; and "KPIs Historical Report" (Figure 10), that shows the total ideas generated and selected per year, per quarter and per month.
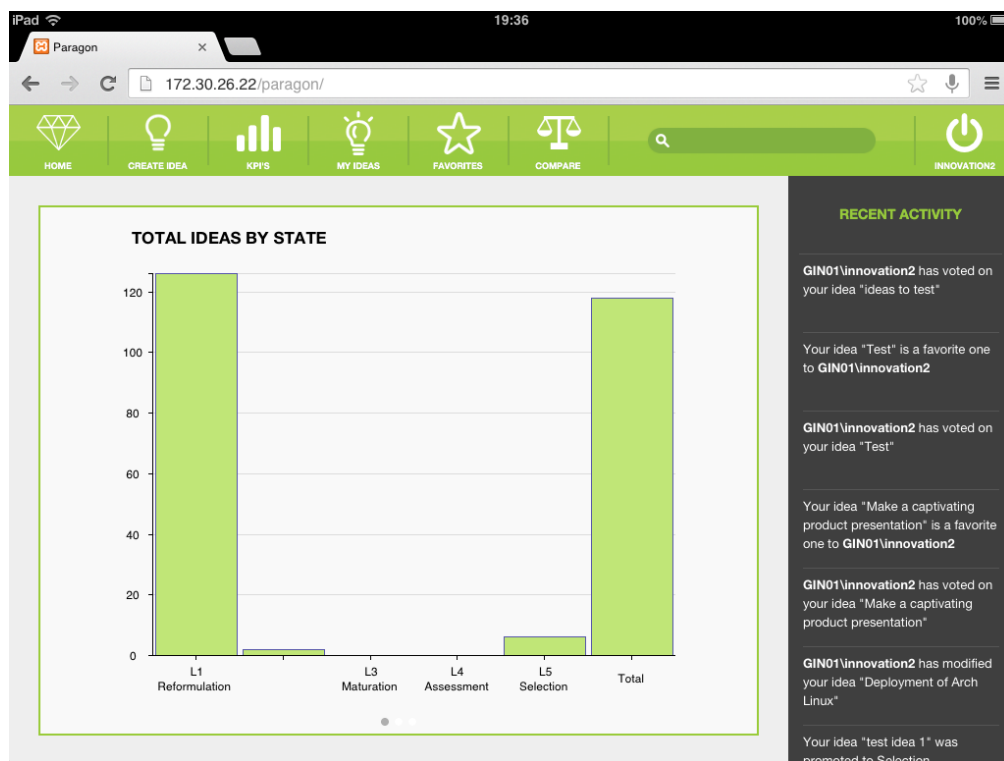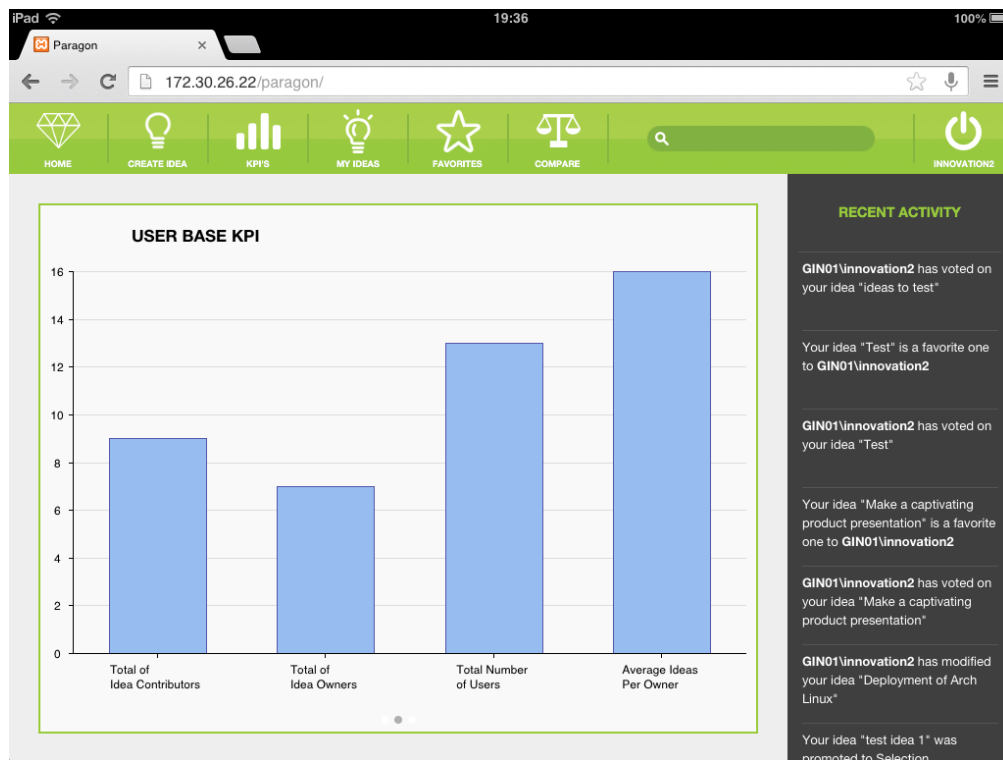

Figure 8. KPIs main page (Total ideas by state).

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

Figure 9. Chart showing the user base KPIs and statistics.
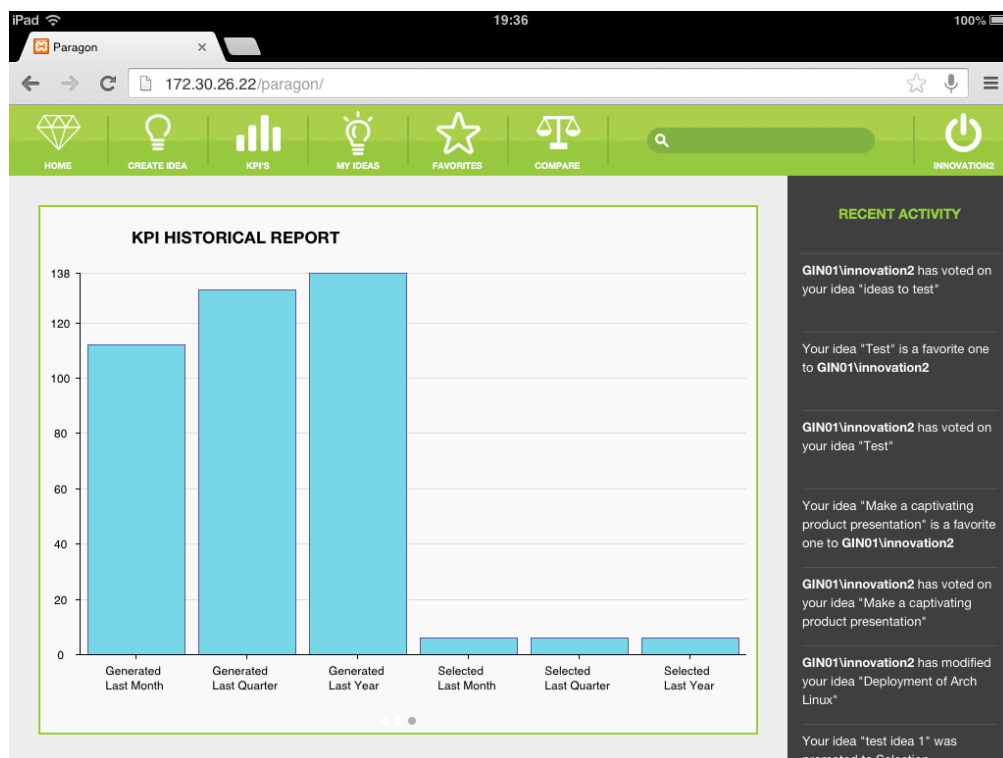
Figure 10. Chart showing the KPIs Historical Report.

Paragon-004-User Manual-EN02.doc
T- WDT (Word Document Template)-EN02.doc

11/06/2013
01/06/2012

3.12 COMPARE IDEAS

To compare ideas that are in the L5 state, tap the "COMPARE" button in the navbar. A screen appears with all the ideas in the L5 state (Figure 11). It is important to note that only executive users or innovation managers have access to this option.

To select a specific idea in the L5 state, use the search field that appears at the top left of the main screen (Figure 11a). The ideas are filtered as the user types.

To select an idea to compare, tap the respective thumbnail (the thumbnail's frame turns black). To remove a selected idea, tap its thumbnail again.
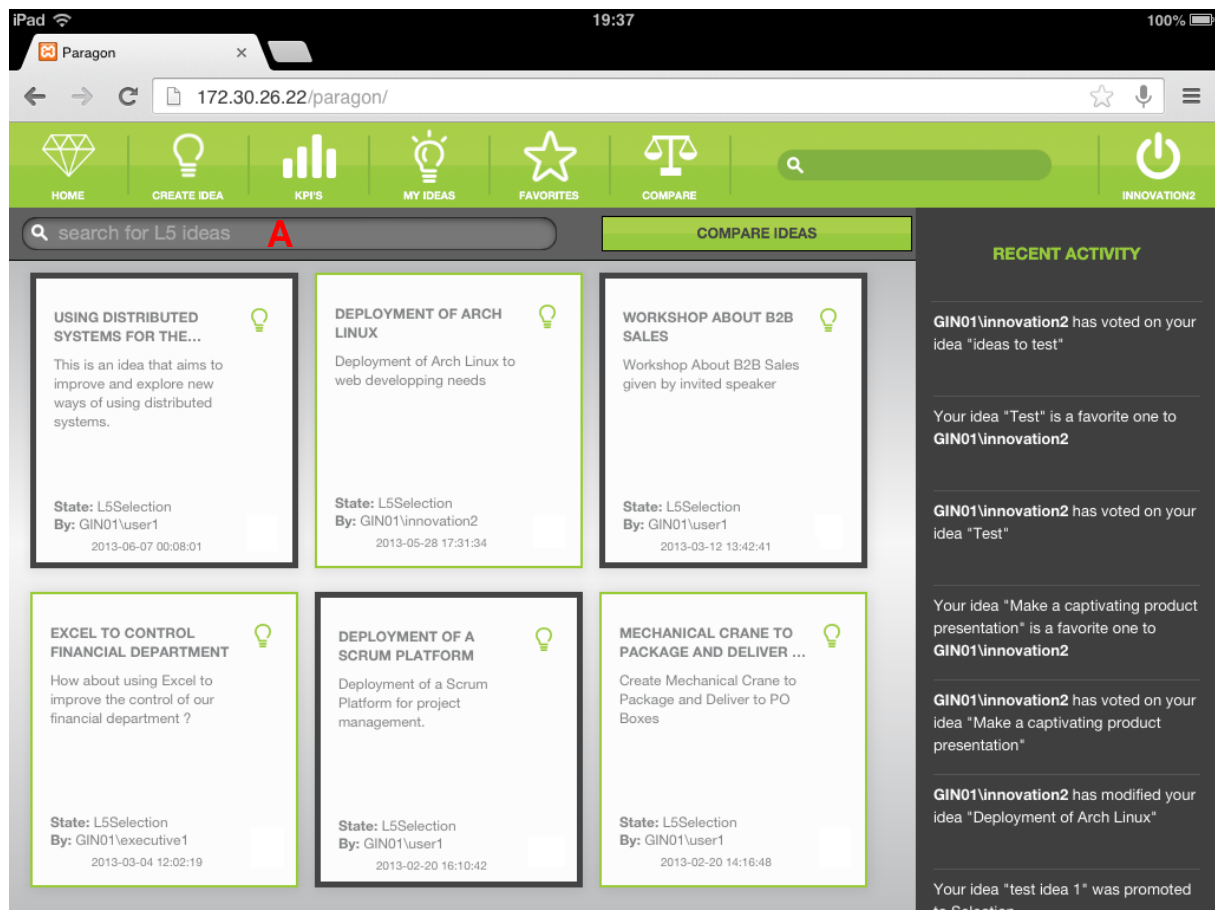

Figure 11. Compare ideas screen.

Up to 5 ideas can be selected for comparison. After selecting at least 2 ideas, they can be compared by tapping the "COMPARE IDEAS" button. An interactive radar chart is shown (Figure 12). To see the idea's score for each attribute, rotate the graphic to match the vertex of the idea to evaluate with the scores.

Paragon-004-User Manual-EN02.doc

T- WDT (Word Document Template)-EN02.doc
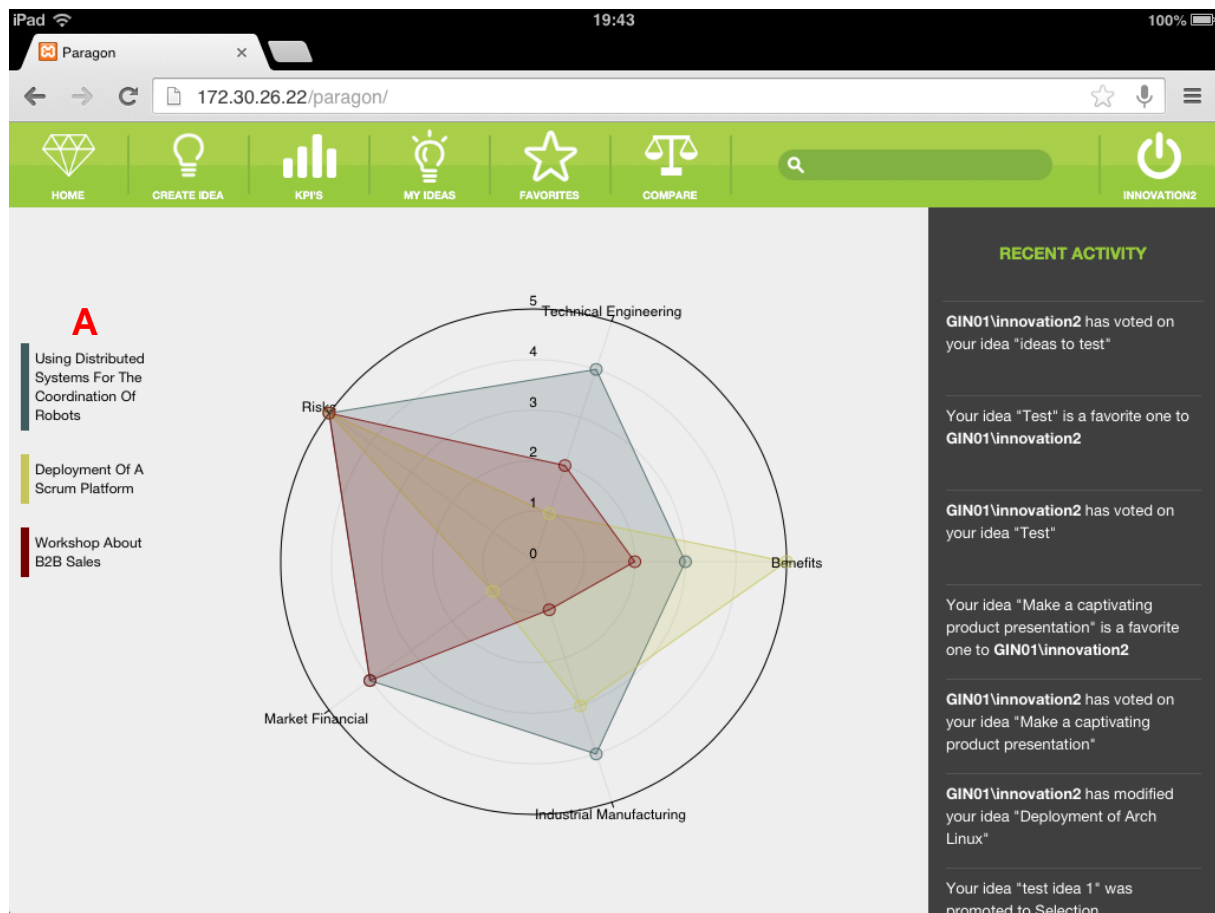
11/06/2013

01/06/2012

Figure 12. Spider graph showing the comparison of 3 ideas.

Each idea appears with a different colour and can be identified by the legend on the left (Figure 12a). By tapping an idea on the legend, the idea is omitted from the chart. By tapping again, the idea reappears.

3.13 LOGOUT

To logout from the application just tap the 🔘 button at the right most side of the navbar.

Paragon–004–User Manual–EN02.doc

T– WDT (Word Document Template)–EN02.doc

Page 17 of 18

11/06/2013

01/06/2012

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Paragon–004–User Manual–EN02.doc

T– WDT (Word Document Template)–EN02.doc

11/06/2013

01/06/2012